Silver Catalyst

Version 1.5.1

User Manual

Control + L	**Toggle between normal and full screen mode**
Control + 1	**Resize page to fit on screen**
Page Up	**Previous page**
Page Down	**Next page**

Introduction

This quick start guide will help you get started with Silver Catalyst. First, we'll show you how to install Silver Catalyst. Next, we'll go through a sample project that will touch on all the main features. Then we will look at each screen individually. Finally, we'll talk about applying Agile principles with Silver Catalyst, followed by some extra topics and additional resources.

Once you are through with this document, you will be able to use Silver Catalyst for your own projects.

System Requirements

Server

1. Microsoft Windows XP Operating System
2. 512 MB RAM
3. 80 MB Hard Disk Space

Client

1. Mozilla Firefox 1.0/2.0 or Microsoft Internet Explorer 6/7

Chapter 1
Getting Started

Installation

Installing Silver Catalyst is easy. Just follow these steps, and you should be ready to go

1. Copy the setup file to your **server computer**
2. Double click the catalyst_setup.exe file. This will start the installation. Click Next to continue.
3. Select a location to install Silver Catalyst to. The default location is C:\Program Files\Catalyst. Click Next to continue.
4. Select the Start Menu group. This is the folder under which Silver Catalyst shortcuts will be stored in the Start Menu. You will most likely leave this at the default value. Click Next to continue.
5. Confirm your choices and click Install to start the installation.
6. Thats it! Silver Catalyst is installed on your machine.

For the rest of this document, we will assume you left the installation values at their default. In case you didn't, be sure to use your value when appropriate.

Upgrading

If you already have Silver Catalyst installed on the server, you will need to upgrade the database before you can use it. To upgrade,

1. First, uninstall the existing version of Silver Catalyst. This can be done by running the “Uninstall Silver Catalyst” shortcut in the Start Menu

2. Next, install Silver Catalyst as described above
3. Finally, run the “Silver Catalyst - Upgrade Database” shortcut in the Start Menu

Starting the Server

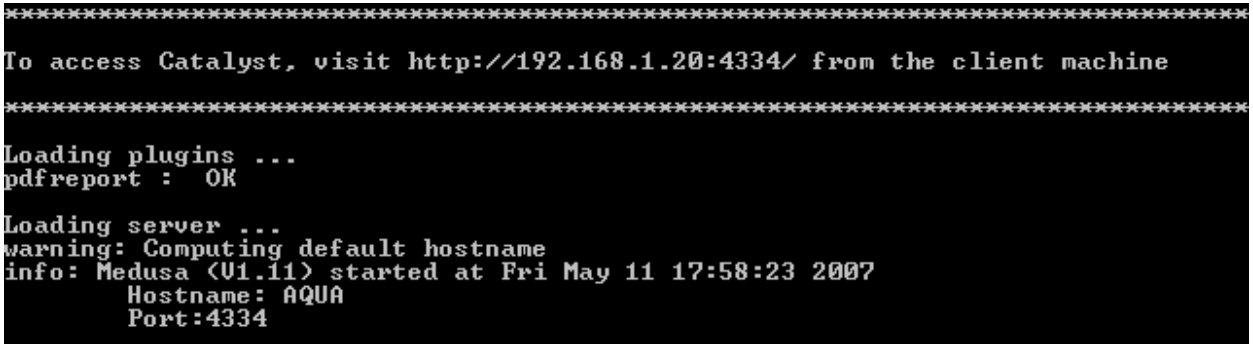
To start the Silver Catalyst server,

1. Go to Start Menu->All Programs->Silver Catalyst and click on Silver Catalyst

To start the Silver Catalyst server via the command prompt, navigate to C:\Program Files\Catalyst and execute “catalyst.exe start”.

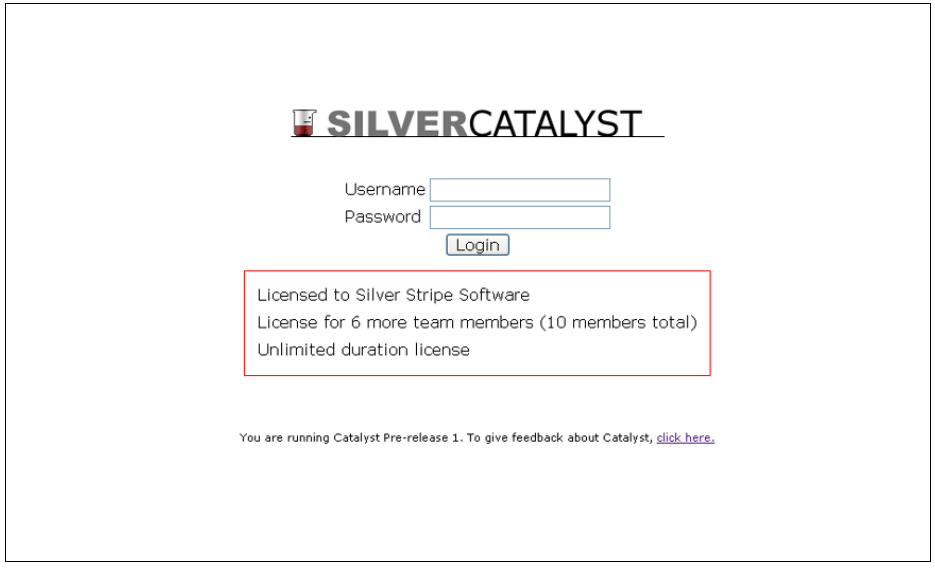
The first time you start the server, you might get a dialog from your firewall software asking if you want to allow Silver Catalyst to start a server. Answer yes to this dialog.

When Silver Catalyst starts, you should see a screen like the one below.


To access Catalyst, visit http://192.168.1.20:4334/ from the client machine
Loading plugins ...
pdfreport : OK
Loading server ...
warning: Computing default hostname
info: Medusa (V1.11) started at Fri May 11 17:58:23 2007
Hostname: AQUA
Port:4334

Connecting to the Server

Open your browser and go to the URL shown on the console window. For the example in the screen above, that would be http://192.168.1.20:4334. The URL will probably be different for your installation. If all went well, you will see the Silver Catalyst login screen. Congratulations, your Silver Catalyst installation is complete!


SILVERCATALYST
Username
Password
Login
Licensed to Silver Stripe Software
License for 6 more team members (10 members total)
Unlimited duration license
You are running Catalyst Pre-release 1. To give feedback about Catalyst, click here.

Shutting down the Server

To shut down the server, go to the console window and press Control + C. After a couple of minutes, the Silver Catalyst server will shut down and the console window will close. You will not be able to use the Silver Catalyst tool when the server is not running.

Chapter 2
Basic Operations

Administrator Login

Silver Catalyst has a default administrator login. The first time you use Silver Catalyst, you will need to login using this account. To login, enter “admin” (without the quotes) for both the username and password fields. When you login for the first time, it is highly recommended that you change the password for this account and create separate accounts for other team members to use Silver Catalyst. See Chapter 9: Administration for details on how to do this.

Navigation

Navigation in Silver Catalyst is done via the icon bar at the top of the screen.

Home Page | Dashboard | Planning | Detail | Logout | Help & Support

The current page will be underlined in red. If a page is inactive, it will be grayed out.

Current page

Inactive page

The dashboard, planning and detail screens will only be active if you have selected a project from the home page.

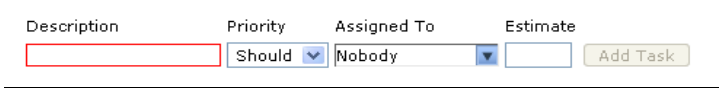
Take note of the help & support screen. This screen contains video tutorials that give an overview of

Silver Catalyst, show you how to do planning, and a demonstration of the auto-synchronisation feature in Silver Catalyst. You will need the Flash plugin to be installed on the browser in order to view the tutorials.

In addition, you can access the support email address, upgrade your copy of Silver Catalyst, purchase additional licenses and access other support data from this screen.

Form validation

Some forms have constraints that will disable the form until the constraint has been satisfied. In most cases, the constraint is used to mark required fields. In a few cases, the constraints may be a bit more complicated such as the end date of an iteration not being before the start date.



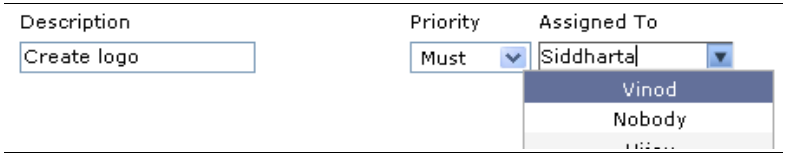
When a constraint on a field has not been satisfied, it will be marked with a red border and the submission button will be disabled as shown above.

Collapsible sections

Many sections in Silver Catalyst can be collapsed and expanded. These sections are shown with a greater than symbol if they are expandable and a lesser than symbol if they can be collapsed. Click the symbol or the text near the symbol to toggle between the collapsed and expanded states.

In place editing

Tasks and iterations can be edited in place in the dashboard, detail and team member views. To edit the item, just click on it. The item will be replaced with a form right there in the same location. Make changes to the item in the form and click Save to save your changes or Cancel to revert back to the original state.



Customer codes

When you visit the help and support screen **as an administrator**, you can view the Customer codes for your installation. The codes are two sets, each 20 characters long. You will need these codes if you have purchased licenses and want to purchase some more, as they enable us to link your new order with your previous purchase.

```
Customer Code A: 181ac40f50bb996870c3
Customer Code B: 6c0bc6719d9803bc6e24
```

Chapter 3
A Quick Tour

This chapter will illustrate the use of Silver Catalyst by following the progress of a team using Silver Catalyst to manage their project. This chapter is organized as follows

1. Day 1 — Setting up the project
2. Day 2 — Iteration planning
3. Day 3 — Day to day use
4. Day 4 — Wrapping up the iteration

First, let us get introduced to the team and stakeholders.

Geoff	The customer
Susan	The business manager
Alex	The project manager
Barbara	The technical lead of the onshore team
Kevin	The technical lead of the offshore team

Day 1 — Setting up the project

Before the team and stakeholders can start using Silver Catalyst, the Silver Catalyst administrator needs to setup the project and the login accounts.

Installation

Alex will be the Silver Catalyst administrator for this project. He downloads Silver Catalyst and installs it as described in the previous chapter.

Logging In

Silver Catalyst comes with a default administrator user. Enter “admin” (without the quotes) in both the username and password fields and click the Login button to log in. Alex logs in to see the Silver Catalyst home page.

Creating a new Project

The first task for Alex is to create a new project. To do this, click on the “Create a new project” link. In the form that appears, enter the project name and click the Create Project button.

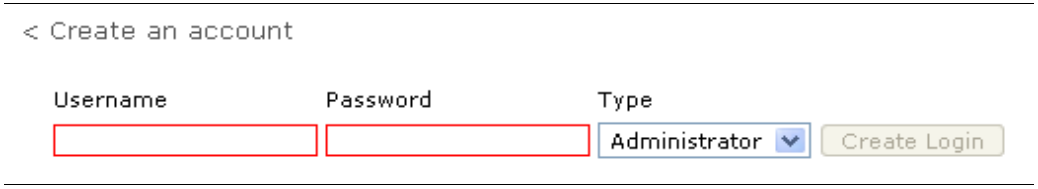
Required fields

Required fields on forms are highlighted in red when empty. The form button will be disabled until all the required fields are filled

Alex creates a project called LoansNow. Once created, a link to the LoansNow project appears on the home page.

Creating a login account

Next, Alex needs to create login accounts for others who need to access the data. To do this, Alex clicks the “Admin Panel” link on the home page to go to the administration page. Once in the administration page, click on “Create an account” to view the account creation form.



Types of login accounts

There are three types of login accounts — Administrator, Participant and Observer.

An administrator can view and edit a project, plus create accounts and set permissions.

A participant can view and edit any project for which they have permission.

An observer can only view the project details for the projects that they have permission.

Based on the roles, Alex creates the following login accounts.

geoff, susan (Observer)

alex (Administrator)

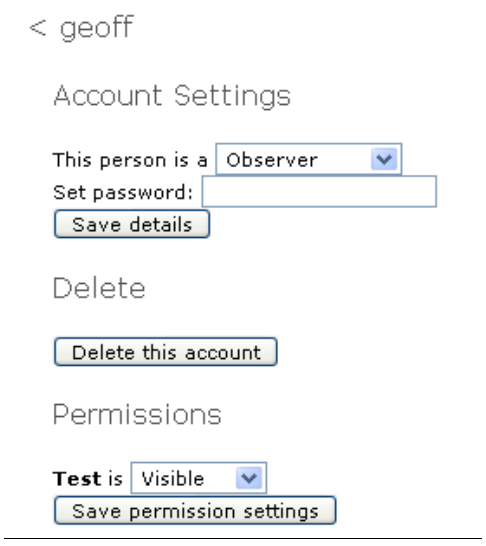
barbara, kevin (Participant)

Logging Out

Having created an account for himself, Alex clicks the Logout button to log out. Alex then logs in again using the account he just created for himself.

Setting project permissions

Once logged in, Alex can no longer see the LoansNow project on his home page. This is because, by default, only the person who created the project has permissions enabled for the project. Alex now needs to set the permissions for the accounts created. To do this, go to the administration page. All the accounts will be displayed under the “Accounts” heading. Click on an account to expand the options for it.



Expanding and contracting sections

Silver Catalyst has a number of sections that can be expanded and contracted to show and hide information. These sections are marked with the “>” and “<” symbols. Click on the heading to expand the section and click again to contract it.

Once expanded, Alex can set the permissions for the LoansNow project for that account. Alex sets the permission to Visible and saves the permission setting for all the accounts.

Day 2 — Iteration planning

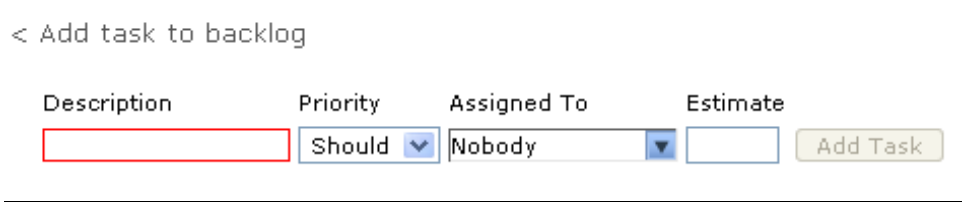
Agile projects are highly iterative. At the start of every iteration is the iteration planning meeting. The iteration planning meeting is a collaborative meeting where the teams and all stakeholders sit together and plan what needs to be done in the following iteration.

The planning screen

Alex returns to the home screen and clicks on the LoansNow link to view the project's dashboard. There is no information in the dashboard at the moment. Alex clicks the Planning button to go to the planning screen. In the meantime, Geoff logs in from his location and Susan logs in from her location. The two teams also join Alex in the planning screen.

Adding tasks to the backlog

After a discussion with everyone (via Skype/Chat/IM/Telephone), Alex gets a list of features to be completed. He now has to add them to the project backlog. To do that, Alex clicks the "Add task to backlog" link and fills up the form.



MoSCoW prioritization

Silver Catalyst has four priority levels: Must, Should, Could and Wont. This type of prioritization is known as MoSCoW prioritization.

Features that absolutely have to be done are categorized as Must. If any of these features are not done, the project will be considered a failure.

Features that are important to the success of the project, but are not absolute musts (they have a workaround or are not so important) are categorized as Should

Features that are nice to have, but not particularly important are categorized as Could

Features that are not going to be implemented this time are marked as Wont. Why have these features in the backlog at all? There are two reasons.

One is that feature priorities can change as the project goes on. These features could have started as Should and been re-prioritized to Wont, and they may be re-prioritized back again.

The second is that these features are a starting point to the second version.

> For more information on MoSCoW method of assigning priority, see Chapter 11: A Guide to Agile.

Tasks added by Alex appear in the product backlog.

< Backlog

Description	Priority	Assigned To	Remaining
Design registration forms	Should	Aarthi	4
Display content on front page	Could	Aarthi	6
Prepare page layout for registration	Should	Vinod	5
Change font hierarchy	Should	Vinod	2

Total Remaining: 17

Creating an iteration

Next, Alex creates the current iteration by entering the name of the iteration and the start and end dates. As the tasks and iterations are added, the screens of all the others in the conference (Geoff, Susan and the two teams) is updated in real time.

< Add iteration to project

Name Start End Add Iteration

Planning the iteration

The teams now have the features in the backlog and an empty iteration. The conference continues in order to determine the features that will be completed in the coming iteration. As features are scheduled for the iteration, the team drags the feature from the backlog and drops it on the iteration.

< Registration (From 8-Oct-2007 To 14-Oct-2007)

Delete Iteration

Description	Priority	Assigned To	Remaining
Create logo	Must	Vijay	5
Register domain name	Must	Aarthi	0
Generate site statistics	Could	Siddharta	0

Total Remaining: 5

Sometimes they decide to move features back from the iteration to the backlog. During the discussion, the team adds a couple of features that they decide to remove. They do this by dragging and dropping them over the Recycle area.

Clearing the recycle

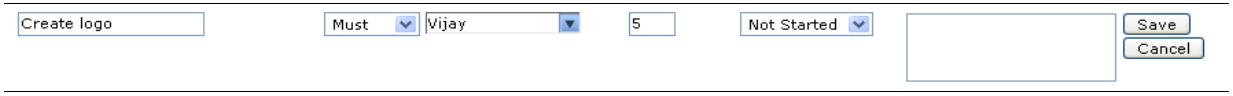
Once the planning is complete, Barbara permanently deletes the tasks that are in the Recycle area by clicking the Clear Recycle button next to the heading.

> Recycle Clear Recycle

Assigning a task

Geoff and Susan log off from Silver Catalyst. Alex and the two teams have to decide who will do each task and how long it will take. They move over to the dashboard screen by clicking the Dashboard button. The dashboard screen shows the tasks for the current iteration.

By clicking on a task, any team member can edit the task. In this case, Barbara clicks on a task and puts in her name in the assigned field and saves it. Likewise, the other team members assign the tasks.



Creating team members

You don't need to create team members in Silver Catalyst. Just enter the name of the person whom you want to assign the task to. If the person exists, the task is assigned to them. If you enter a name for the first time, a person with that name is automatically created and the task assigned to that person.

Estimating a task

Once assigned, team members estimate the tasks. Like assigning, Kevin clicks on a task to edit it and enters the estimate in the estimate field. Once that is done, he clicks the Save button to save the edited task.

Estimate in which unit?

Silver Catalyst does not specify the units for any of the estimates, which means it is up to the team to decide on a unit. Some teams specify estimates in hours, some in days and some in “ideal points” or “story points”. As long as the team knows how they are estimating, they can interpret the estimates accordingly. For more on estimating by “ideal points”, see Chapter 11: A Guide to Agile.

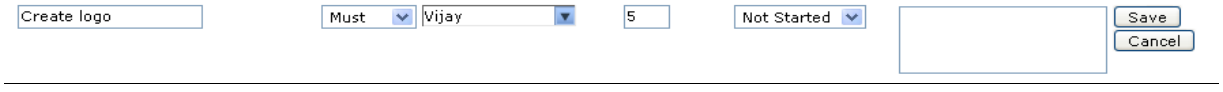
Once all the tasks are assigned and estimated, the planning is complete. Congratulations! It's now time to start doing the work.

Day 3 — Day to day use

How does Silver Catalyst help you in day to day work? This section explains.

Updating task estimates

As work is done, the task estimates need to be updated with the duration remaining. This is done by going to the dashboard, clicking the task, changing the estimate field and saving the task. You can also change the task status this way.



The notes field

The notes field is a free-form area where you can store any information about the task. Need to store the requirement id? Put it here. Need to store the bug number from the bug database? Put it here. Want to store a URL? This field is the place. Is the task currently blocked for some reason? Type that here.

The daily stand up meeting

One of the key features of agile is how everyone in the team knows what is happening in the whole project. The daily stand up meeting is a facilitator to this. Alex runs the daily stand up meeting for fifteen minutes, the first thing every day. Along with Barbara and the onshore team, Kevin and the offshore team also join in the stand up (via Skype/Chat/IM/Telephone).

The dashboard view shows the burndown chart for the iteration. The teams use the burndown chart to gauge their progress and estimate the position at the end of the iteration. The burndown chart also alerts the team to possible impediments in the iteration.

> **Burndown chart**
>
> For more on using the burndown chart, see Chapter 11: A Guide to Agile.

Day 4 — Wrapping up the iteration

Great, the iteration is done. It's now time to reflect on the progress of the iteration. Agile teams spend a short amount of time at the end of each iteration to see what went well, what didn't go so well and where they can improve.

Checking your progress

On the last day of the iteration, Kevin calls in everyone for a conference to discuss the iteration progress. The burndown chart shows how much of the work was planned and how much was completed. Using this chart, the team can discuss reasons for any irregularities during the iteration and how to improve them.

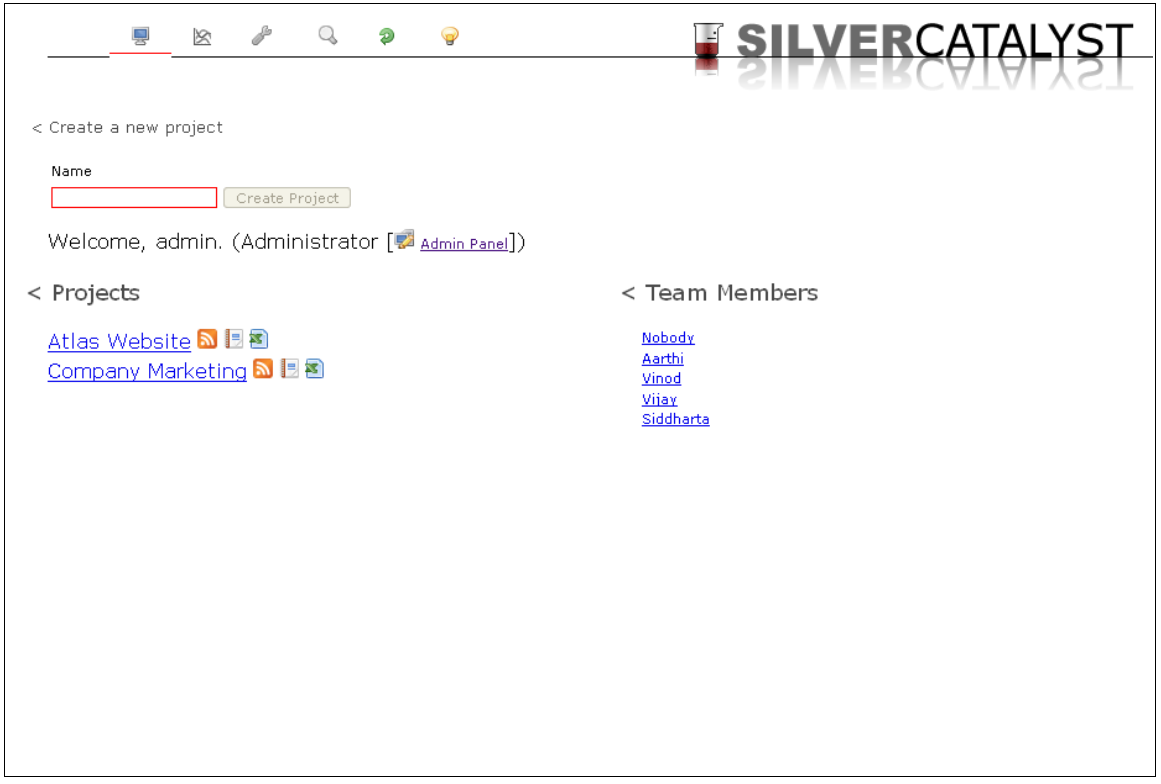
Calculating the velocity

The team also calculates the velocity of the iteration. The velocity is the amount of work done in the iteration, and is calculated by taking the initial estimate and subtracting the estimate left over at the end.

Scheduling the next iteration

The next time around, the team takes tasks based on feedback from this iteration. If they managed to finish all tasks, they can plan for more tasks next iteration. If they couldn't complete everything scheduled for this iteration, Barbara moves all the unfinished tasks to the next iteration and the teams plan for fewer tasks next time.

Chapter 4
The Home Page



When you first login to Silver Catalyst, you will be presented with the home page. The home page shows a list of projects and the team members that are using Silver Catalyst. Additionally, you can create a new project here. The home page also shows you the account login you are using and the type of the login. If you are logged in as an administrator, you will have a link to the administration panel here, otherwise you will have a link to your account settings.

The list of projects

The home screen shows you the list of projects *that are visible to you*. There may be additional projects that you do not have permission to view. These projects are not displayed.

Clicking a project in the list takes you to the dashboard screen for that project. Next to the project link is an orange icon. This represents the RSS feed for the project. Clicking this icon will open up a dialog with the URL to the RSS feed. You can then add the RSS feed to your feed reader software to receive notifications about the project. For more information, see Chapter 12: Using RSS.

Next to the RSS icon will be a list of plugin icons. These icons appear when the plugin is installed. In the above screen, no plugins have been installed, and no icons appear. By default, the Wikilink plugin and the CSV import/export plugins are displayed. For more information on these plugins, see Chapter 13: Plugin Support

The team member list

The team member list shows a list of all the team members from all the projects who are using Silver Catalyst. Clicking on a team member's name will show the tasks that have been assigned to that team member. The tasks are shown from all the projects that are visible to you.

Creating a new project

To create a new project, click the “Create a new project” link to expand it and display the form. Then enter a name for the project and click the “Create Project” button. Note that as of now, you can only use English alphabets, digits and spaces in the project name. You cannot use a name that already exists.

When you create a new project, you will automatically have permission for the project. However, *the*

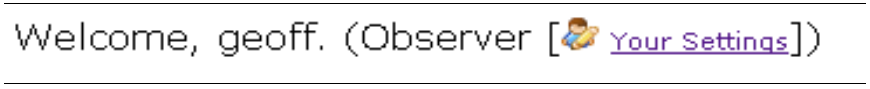
project will be invisible for everyone else. Ask your Silver Catalyst administrator to give permission to any other login accounts that require visibility to this project.

The login username and login type display

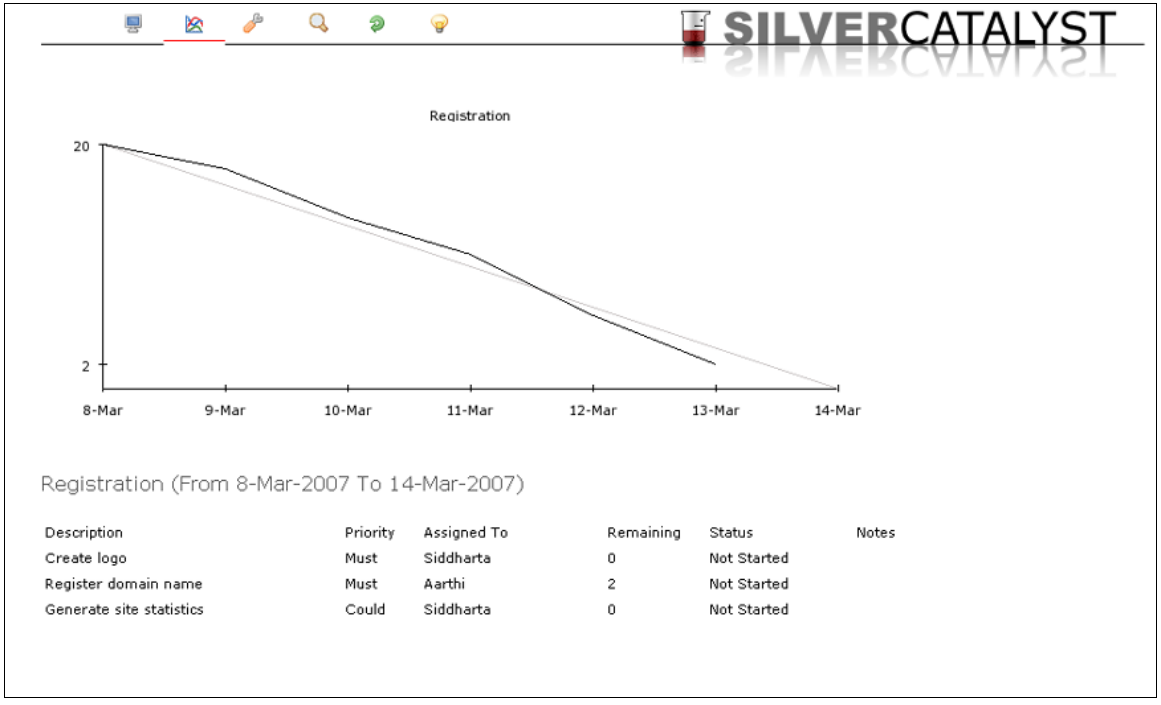
The home page also shows you the username you have logged in with and the type of the account — Participant or Observer.

In the case of an administrator, a link to the administration screen is shown here.

Otherwise, a link to the settings page will be shown.



Chapter 5
The Dashboard



The dashboard shows you all the information about the current iteration in the project. There are two main display sections — the burndown chart and details of the iteration. Although not a complicated screen, it is a key screen that can tell you everything you want to know about the current iteration.

The burndown chart

The burndown chart is the heartbeat of the iteration. It shows you how much work is remaining on each day of the iteration. By extrapolating the amount of work remaining, you can make a rough estimate as to when you will complete or how much work will be left over at the end of the iteration. The shape of the burndown chart can also be used to bring impediments to light. For more on interpreting burndown charts, see Chapter 11: A Guide to Agile.

Iteration details

Below the burndown chart are the iteration details. This section show the iteration name and duration, followed by a list of tasks in the iteration.

To edit the iteration or task details, just click on the task. The task will be replaced by a form where you can change any of the details. Click Save to save the edited details or click Cancel to cancel your changes.

This is really useful when you want to update the estimate continuously as you finish work, or you want to reassign a task to another team member during the daily stand up meeting.

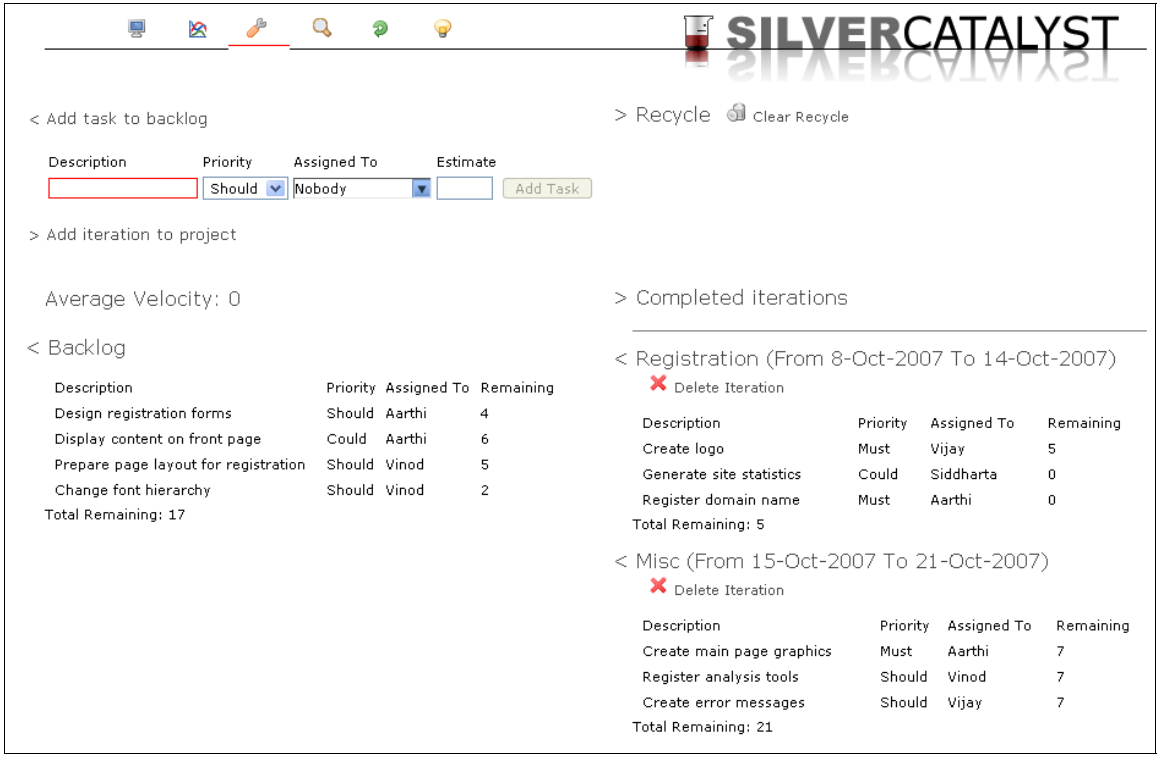
PDF report

Below the iteration details is the PDF Report. This allows you to download a PDF version of the current iteration status. The PDF report is useful for mailing to stakeholders who do not use Silver Catalyst. You can also print it out and use it for the daily standup meeting. For more information on PDF report, see Chapter 13: Plugin Support

Customizing the dashboard

The dashboard screen can be customized by embedding external web pages such as build status or acceptance test pass rate. For more information on how to do this, see Chapter 10: Customizing the Dashboard.

Chapter 6
Planning Screen



The planning screen is where you plan out your iterations. This screen allows you to create iterations and tasks, schedule tasks and delete tasks.

Creating an iteration

To create an iteration, click the “Add iteration to project” link to expand the form. Enter a name for the iteration and the start and end dates of the iteration (both dates are included in the iteration).

Entering dates is optional, so you can leave it out if the dates are not yet decided, or enter just the start or end date. However, note that the iteration will only appear in the dashboard if both the start and end

dates have been entered. There is no way to calculate whether an iteration is in progress otherwise.

Another thing to remember is that while the start and end dates can be the same day to get a one day iteration, the end date cannot be before the start date.

Creating a task

A task is created by first clicking the "Add task to backlog" link to expand the form, and then filling up the form. Enter a short description of the task, its priority, the person to assign to and the estimate for the task. When you create a task, it appears under the Backlog section.

To assign the task to someone, just enter the team members name. If the name is being used for the first time, the team member will be automatically created. Otherwise, the drop down box will allow you to select one of the team members who are a part of the project.

For more on estimating the work, take a look at Chapter 11: A Guide to Agile.

Scheduling a task

To schedule a task, drag the task from the backlog and drop it over the destination iteration. You can use the same technique to move tasks between iterations or from an iteration back to the backlog.

To move more than one task at a time, click on each task to select it, and click and drag the last task to move the whole group. You can even select tasks from different iterations for group drag and drop.

If the iteration you want to drop on is outside the screen, just drag the tasks to the top or bottom of the screen to automatically scroll the window up and down respectively.

The average velocity

The average velocity is displayed above the burndown list. This shows you how much work actually gets completed in an iteration. Use this to calculate how much work should be scheduled in the iteration.

Deleting a task

To delete a task, drag the task and drop it over the Recycle area. You can undelete tasks at any time by dragging them out of the Recycle and back to the Backlog or iteration.

If you want to permanently delete the tasks, then right click on the recycle area and click the “Clear Recycle” button in the Recycle area.

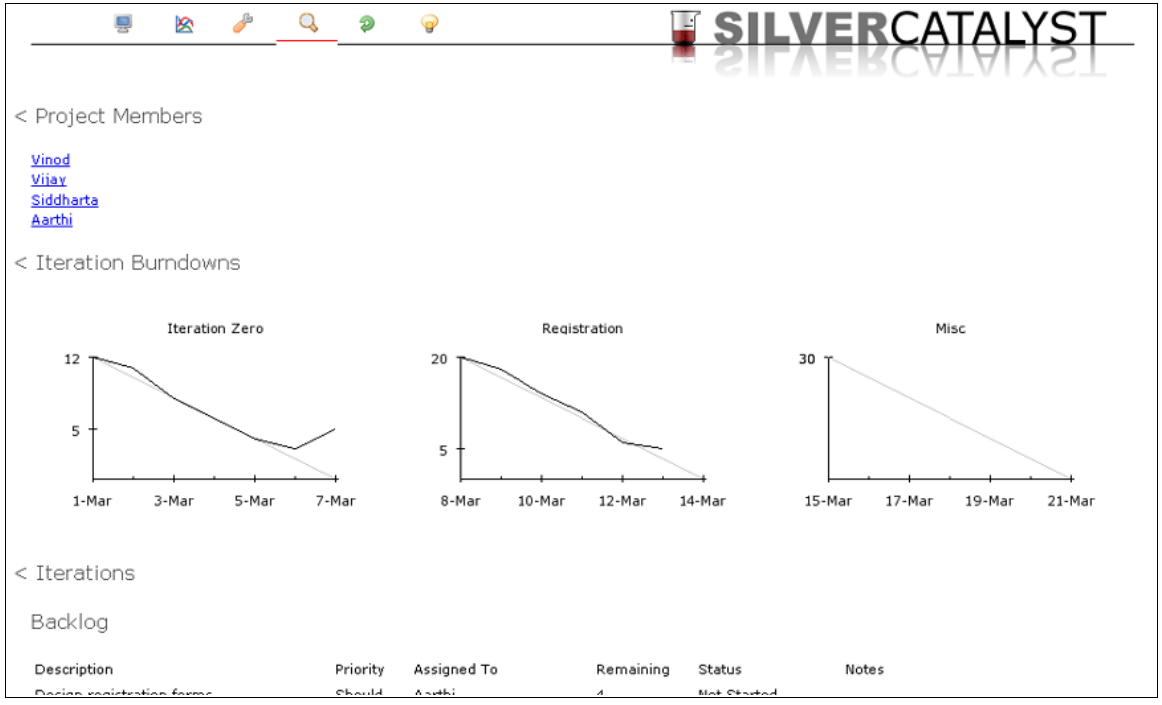
Completed Iterations

Completed iterations are shown in a separate section. Click on the Completed Iterations heading to expand that section and show previous iterations. You can expand any of the previous iterations to see the tasks for that iteration.

Deleting an iteration

If you create an iteration by mistake and want to get rid of it, click the Delete Iteration button next to the iteration name. If there are any tasks in the Iteration, they will be moved to the recycle area. You can either permanently delete the tasks or move them back into the backlog.

Chapter 7
Detail Screen



While the dashboard and the planning screen only show you a part of the project, the detail screen shows you the entire project. There are three main sections to this screen — the project members, the iteration burndown comparison and the iteration details.

Project members

This list shows you all the team members who are a part of the project. This is different from the list on the home page, which shows you all the team members from all projects. Clicking on a persons name will take you to the team members screen.

Iteration burndown comparison

The iteration burndown comparison shows you the burndown charts for all iterations in the project. You can see the starting estimate for the project and the amount of work left over at the end. This shows you the **iteration velocity**, which is the amount of work done during the iteration.

Click on any of the burndown images to view a larger version of the burndown.

Using the burndown comparison, you can compare both the shape and velocity from one iteration to the next. Use this to see trends between iterations. Are you getting better at doing work? Is there a particular burndown shape that is repeating itself? (For more on the burndown shape, check out Chapter 11: A Guide to Agile) How do you compare against ideal burndown rate? This comparison is also useful when conducting iteration retrospectives.

Note that the iteration needs to have both the start and end dates to be defined in order to generate the burndown chart.

Burndown charts are also shown for future iterations that have not been started. These iterations will just show the scheduled work and the ideal rate (see the third burndown in the screen above).

Iteration details

Below the burndown comparison are details of all the tasks and iterations in the project. As usual, you can click on any task or iteration to edit it right there. This is useful when you want to edit a task from a future iteration or a completed iteration. The dashboard is probably a better place to edit tasks from the current iteration.

Chapter 8
Team Members

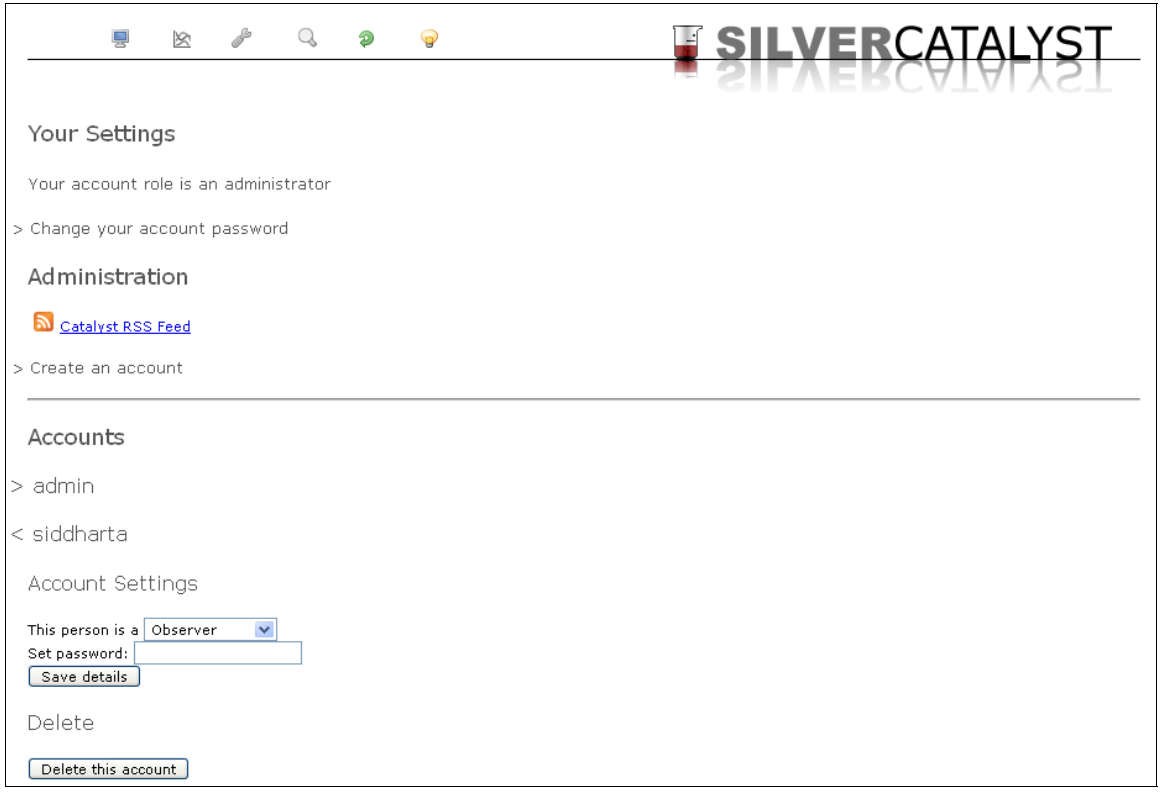
SILVERCATALYST
Aarthi
Atlas Website
Backlog
Description Priority Assigned To Remaining Status Notes
Design registration forms Should Aarthi 4 Not Started
Display content on front page Could Aarthi 6 Not Started
Registration (From 8-Mar-2007 To 14-Mar-2007)
Description Priority Assigned To Remaining Status Notes
Register domain name Must Aarthi 0 Not Started
Misc (From 15-Mar-2007 To 21-Mar-2007)
Description Priority Assigned To Remaining Status Notes
Create main page graphics Could Aarthi 7 Not Started
Display tasks in red Could Aarthi 7 Not Started
Iteration Zero (From 1-Mar-2007 To 7-Mar-2007)
Description Priority Assigned To Remaining Status Notes

The team member screen shows you all the tasks from all the projects assigned to one particular team member. Like the dashboard and detail screens, you can click a task or iteration and edit it in place.

This screen is useful for a team member to keep track of what they have to do and adjust the estimates of their tasks.

Another use of this screen is during planning you can see how loaded the team member is across all the projects. Thus you would assign less tasks to a team member who also has work from some other project and more tasks to a team member who is relatively free.

Chapter 9
Settings and Administration



The settings and administration screen is where users can change their Silver Catalyst settings. In addition, administrators can create new login accounts, edit accounts and set permissions in this screen.

Changing your password

You can change your account password by clicking on the “Change your account password” link under the Your Settings section and entering a new password in the form that appears.

Catalyst RSS Feed

The Catalyst RSS Feed is a special administrator feed that notifies the administrator of all changes *from all projects*. In addition, this feed also contains notification of administrator actions like creating and editing accounts and changing permissions.

Creating an account

To create an account, click the “Create an account” link to expand the form. Then enter a username and password and set the type of the account.

Administrators have access to the administration section of Silver Catalyst. Participants can view and edit project details. Observers can only view project details, but cannot edit them.

Normally, team members are participants and customers or management are observers. This allows customers or management to get visibility into the project.

Editing an account

Under the Accounts heading is a list of Silver Catalyst accounts. Click any account to expand it. Here, you will be able to change the type of the account or change the password. You can also delete the account here. Note that you cannot delete the account that you are currently logged in as.

In case you change the administrator password and then forget the password, you can re-generate the administration account.

In order to do this, you need access to the server machine. Shutdown the Silver Catalyst server. Then from the command line, go to the directory where you installed Silver Catalyst and type “catalyst.exe createadmin”. This command will create an administrator account with username “admin” and password “admin”. Now start the server again and you will be able to log in with the above account.

Setting project permissions

You can also set the project permissions for the account. Permissions allow a specific project to be visible or hidden to a particular account. Each project is shown with the current permission. Change the permission for any of the projects and submit the form to save the new permissions.

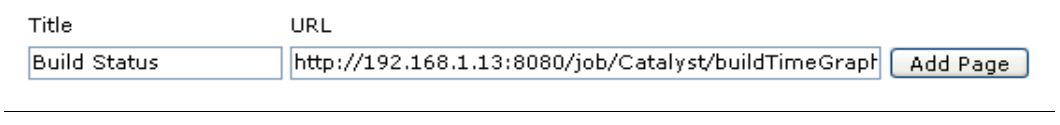
Chapter 10
Customizing the Dashboard

Silver Catalyst has a customizable dashboard through which you can embed external web pages into the dashboard. Use this feature to display the current build status, acceptance test pass rate, the bug rates or any other piece of information that you want to view on a regular basis. Instead of visiting each application regularly, you can get all the information on the dashboard screen of Silver Catalyst.

Configuring the dashboard

To manage the list of pages that are displayed on the dashboard, click on the "Configure External Dashboard Pages" link on the dashboard screen.

You can configure the title of the page and the URL of the page that you want to add.



After you add the page, it will appear on the dashboard screen. You can always return to the configuration page by clicking the "Configure External Dashboard Pages" link to add more pages, edit existing pages and delete pages that you no longer want to view.

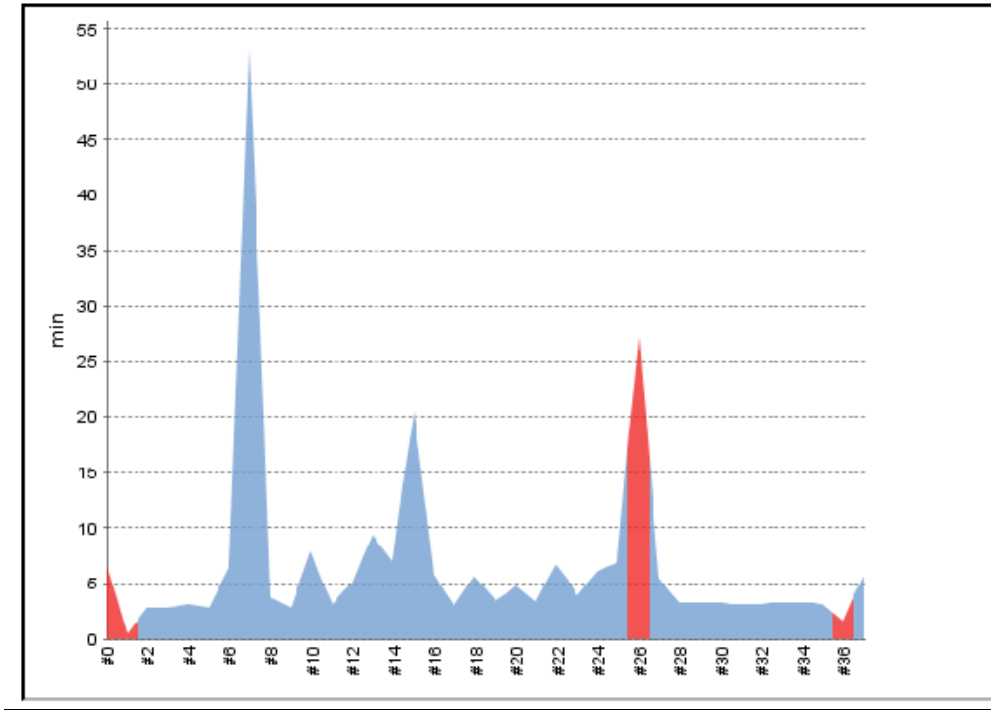
silver stripe software

SILVERCATALYST

External Pages

Configure External Dashboard Pages

Build Status



Chapter 11
A Guide to Agile

In this chapter, you'll see how you can apply various agile project management concepts using Silver Catalyst. This section assumes that you have an understanding of an agile process. If you would like to learn more about agile software development, then there are a number of excellent online discussion groups. Check out the Online Resources section of Chapter 14: Further Resources for some of them.

Tasks

A task in Silver Catalyst is meant to resemble an index cards in its properties, namely

1. It is short
2. It is easy to create
3. It is easy to edit and move around

The description field is for a short one line description of the feature. An example would be “Add a user to the project”. Keep it short and sweet. It is easy to get carried away and try to fit in a few paragraphs. If you need additional detail, use the wikilink plugin to link the feature with a wiki page.

Feature Driven Development (FDD): Feature naming template

FDD has a simple template for naming features. The template is

<action> <result> <object>

For example,

Calculate the average of the price
Add a user to the project

This is a nice template for keeping your descriptions small yet descriptive.

Extreme Programming (XP): User story template

XP has another template for naming user stories. The template is

As <role>, I want <feature>, so that <business value>

For example,

As a manager, I want to be able to login, so that I have visibility into the project

This form of naming is good if you want to make the business value clear

Stories vs Features vs Tasks

Most agile processes make a distinction between a feature and a task.

In such teams, a "feature" (also called a user story) is used to refer to a anything that directly leads to business value. For example, "Add a user to the system" would be considered a feature. A "task" is used to refer to actions that must be performed internally, but do not directly add business value. "Refactor the database code" is an example of a task.

Silver Catalyst provides no distinction between features and tasks. As far as Silver Catalyst is concerned, everything is a task that needs to be completed. You can still provide the differentiation by using the notes field to mark the tasks that are customer valued features. Set the estimate for these feature-tasks to zero. When all the sub-tasks are completed, set the feature-task status to Done.

The priority field allows you to set the priority of the task. Silver Catalyst supports four different priority levels: Must, Should, Could and Wont. Agile processes generally advocate that you do the highest priority tasks first. The priority field helps you make this decision. How do you decide the priority of a task? This is an interesting exercise by itself.

MoSCoW prioritization

Silver Catalyst has four priority levels: Must, Should, Could and Wont. This type of prioritization is known as MoSCoW prioritization.

Features that absolutely have to be done are categorized as Must. If any of these features are not done, the project will be considered a failure.

Features that are important to the success of the project, but are not absolute musts (they have a workaround or are not so important) are categorized as Should

Features that are nice to have, but not particularly important are categorized as Could

Features that are not going to be implemented this time are marked as Wont. Why have these features in the backlog at all? There are two reasons. One is that feature priorities can change as the project goes on. These features could have started as Should and been re-prioritized to Wont, and they may be re-prioritized back again. The second is that these features are a starting point to the second version.

One mistake often made is to prioritize all tasks as Must. Instead, try to minimize the number of tasks set to Must. Let the team take the time to discuss priorities with the customer. This is important because all agile processes depend upon doing the highest priority tasks first.

Setting the priority

Selecting the priority of a task can be based on a number of factors. One factor is the amount of value the task has to the customer.

You might also want to set the high risk tasks to Must, or the tasks with the most unknowns . This is the “fail fast” strategy . With the fail fast strategy, you know right away if there are going to be any problems instead of finding out somewhere at the end of the project.

Assigning a task to a person is simply a matter of entering the team members name in the field. The team member is automatically created when the name is encountered for the first time.

How should you assign tasks?

Should the project manager assign tasks to the team members, or should the team members choose the tasks that they want to work on? That is up to you, but no matter which you choose, it is a good idea to ensure that the teams and project managers have discussed it before hand.

One interesting solution is to keep all tasks assigned to "Nobody". Then ask everyone to pick one task. As each team member completes a task, they can pick one more from the list of unassigned tasks. Therefore, at any point in time, each team member is only assigned a single task. This allows the team to automatically balance the load between the team members.

To estimate a task, enter the estimate into the estimate field. Silver Catalyst does not specify the units for the estimate. That means it is up to the team to decide on the units and interpret the estimate accordingly. Some teams estimate in hours, some estimate in days. Other teams use other units for estimates.

Estimating using story point units

One of the units you can use for estimating your tasks is "story points". A story point is an abstract quantity that represents the complexity and length of completing the task. Choose an estimate for the first task, and estimate the remaining tasks relative to the first task. For example, if the second task is estimated to be twice as difficult as the first task, assign it double the number of story points. If its the same complexity, give it the same number of story points, and so on. Over time, you will be able to use the feedback to get better at judging how many points to estimate for a given task.

Once you do that, then you can calculate the number of story points you delivered in the previous iteration and use that as a guide towards planning the next iteration. For story point estimation to work, you only need to ensure that the way you estimate tasks remains consistent.

Tasks status in Silver Catalyst can be one of Not Started, In Progress, Done, Pass, Fail. Typically, a task starts as Not Started. When someone works on it, change it to In Progress. Once it has been implemented, mark it as Done. When the acceptance tests are run, the status can be changed to Pass or Fail appropriately.

When is a task really done?

One of the things you have to figure out is to decide when a task is done. Is it when the coding is complete? Is it when the tests pass? Silver Catalyst contains two status that can be used to mark done — Done and Pass. It is usually better to have a set of acceptance tests for each task. That way it is easy to see when a task is done — when the tests pass. If you are doing something like this, use the Pass state to indicate that the task is done. Some teams do not yet have a comprehensive set of acceptance tests. In such a case you can use the Done state when the coding is done or the unit tests pass to indicate that the task is done.

Whatever you choose, ensure that the whole team is clear on what “done” means. Then use that definition to decide when the task is done.

The notes area is a free form area that you can use to store any data that you want. Some possibilities — For bugs, you may want to store the bug number (or URL) so that you can reference the bug in the bug database. If you have some external documents, you might want to put in a reference to those documents. You can use it to “mark” tasks, for example annotating the customer valued feature-tasks with {{feature}} in the notes field. Or use your own annotation. Or you can just leave it blank.

What is the use of annotating tasks?

Its for your own convenience at the moment. We may use annotations in the future, but the current version of Silver Catalyst doesn't do anything with the annotation. One more reason you might want to use annotations is to mark tasks which can then be manipulated using external scripts. For example, you may want to mark bugs using the {{bug #id}} annotation. You can then write a script to change the status of the task when the bug is fixed.

Iterations

In Silver Catalyst, you can give a name to your Iterations. Normally you would just call the iterations "Iteration 1", "Iteration 2", etc. However, this is a good place to think about iteration goals. If you decide to have an iteration goal, it is a good idea to put the goal as the name of the iteration.

Sprint goals

Iterations (sometimes called Sprints) can have a sprint goal. This is the overall goal, or theme of the sprint. For example, a sprint goal might be "complete payment processing". While planning, you would then schedule tasks related to completing the sprint goal. A sprint goal is useful because it provides focus to the sprint. Rather than having the sprint consist of a series of unrelated tasks, a sprint goal makes you choose related tasks. This, in turn, increases the feeling that you have accomplished something at the end of the iteration.

Next, you will want to put in the start and end dates for the iteration. This is the time to make another decision — the length of the iteration.

Iteration lengths

How long should your iteration be? 4 weeks? 2 weeks? 3 days? As with most other things, it depends. There are a number of factors to keep in mind while deciding on the iteration length.

Change: The start of the iteration is a change point — it is the only place where the customer can give feedback and re-prioritize features. If the customer feels that they need to make changes often, you might want shorter iterations.

Uncertainty: The more the uncertainty, the shorter you want the iteration to be. This is required so that you get quicker feedback.

Team experience: You might want a longer iteration length with a less experienced team.

Communication: Projects with less communication between the stakeholders will benefit from shorter iterations.

The most common iteration lengths are 2 weeks and 4 weeks.

The burndown chart

The burndown chart is used to gauge the progress of an iteration. By looking at the angle of the line, you can see whether you are going to finish on time or not. It is not uncommon to underestimate tasks and take on too much work for the first few iterations. After a couple of iterations, you will get a feel for how much work can be accomplished.

Apart from that, these are some burndown shapes to look out for:

The Flat Burndown

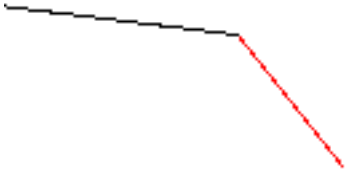
This is an indication that the team is either stuck or not updating the tasks daily. In either case, discuss to see what the problem is.

The Rising Burndown

This is an indication of an underestimation or scope creep. Underestimation is fine, it happens once in a while. Try to avoid scope creep.

The Irregular Burndown

This is an indication of an incomplete understanding of what to do. The estimate swings wildly as new information is uncovered.

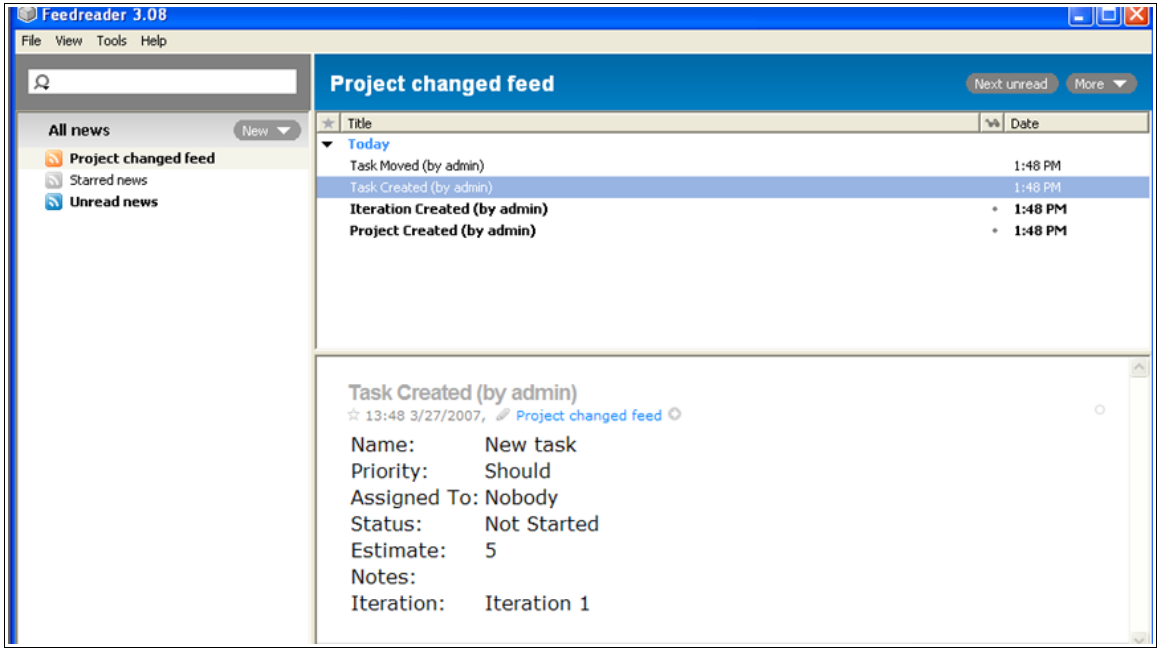


The Sudden Drop

This happens when tasks are overestimated or estimates are suddenly edited after a gap. Edit the estimate for tasks in progress at least once a day.

Remember that the burndown chart is like the pulse of your iteration. If it flat-lines or starts misbehaving, it means that your iteration is getting sick. Take notice and take action.

Chapter 12
Using RSS



RSS is a technology that allows you to be notified of changes. Silver Catalyst uses RSS to publish project notifications, such as when tasks have been created or changed.

To view RSS notifications, you need a software capable of reading RSS notifications. They are generally referred to as feed readers or news aggregators . There are a number of free and paid feed readers available on the Internet.

To view Silver Catalyst feeds, make sure you use a reader that can access the Silver Catalyst server. **Internet feed readers will not be able to access Silver Catalyst**. Use a desktop or a LAN version instead.

Subscribing to the RSS feed

The rest of this chapter will assume that you have some knowledge about RSS and that you have access to an RSS reader software. Once you have the feed reader set up, you need to subscribe to the feed in the software. The procedure varies between different software, so consult your feed reader documentation on how to do this.

No matter which software you use, you will need to enter the URL of the feed in the software. To get this URL, click on the orange RSS icon. The dialog box that appears will contain the URL for that feed. Enter this URL into your feed reader software. Once subscribed, you will receive notifications as shown in the screen at the start of this chapter.

http://127.0.0.1:4334/WSGI/app/catalyst/projects/Atlas%20Website/feed/
You can get RSS notifications for this project at the above URL. In order to read the RSS notifications, you will need an RSS reader software. Enter the above URL into your RSS software to recieve notifications for this project
Close

Unsubscribing from the RSS feed

If you no longer wish to receive notifications, you can unsubscribe from the feed. Your feed reader software will have a method to do this, so consult your reader's documentation to find out how to do this. Once unsubscribed, you will no longer get any notifications. You can subscribe and unsubscribe any time you want.

Chapter 13
Plugin Support

Plugins

Silver Catalyst has support for plugins. These plugins can be installed to extend the functionality of Silver Catalyst. By default, Silver Catalyst is installed with the PDF Report plugin, which we discuss in further detail below. As new plugins are created, they will be added to the Extras section of the Silver Stripe website. You can access this section at http://www.silverstripesoftware.com/extras/

Installing and removing plugins

The steps for installing and removing plugins may be different for different plugins. Consult the plugin documentation for instructions.

Enabling and disabling plugins

Once a plugin has been installed, it can be enabled and disabled at any time. To enable and disable the plugin, you need to edit the "pluginconf.py" file in your Silver Catalyst directory.

To enable a plugin, first stop the Silver Catalyst server. Then add the plugin name, surrounded with quotes and ending with a comma to a line between the square brackets. Note that the plugin name is case sensitive, and that the quotes and comma are important.

```
plugins = [
        "pdfreport",
                ]
```

Save the file and restart Silver Catalyst. Silver Catalyst will load with your new plugin installed.

To disable a plugin, stop the Silver Catalyst server, then remove the line containing the plugin name from the pluginconf.py file. Save the file and restart Silver Catalyst.

```
plugins = [
                ]
```

PDF Report

By default, Silver Catalyst is installed with the PDF Report plugin. This plugin allows you to download a PDF version of the project dashboard.

It will be enabled by default, so unless you disabled it, you do not need to do anything.

When enabled, the dashboard screen will have a PDF section below the iteration details.

Click the link to download the PDF report for the project.

Wiki Link

Wiki Link is another plugin that comes with Silver Catalyst. Wiki Link allows you to link tasks in Silver Catalyst with pages on a wiki. This allows you to add more information about the requirement in the wiki page and reference it within Silver Catalyst. Agile teams typically use the wiki to store detailed requirements, UI screenshots, design notes, acceptance test cases and other documentation.

CSV Import/Export

CSV Import/Export is a plugin that allows you to import CSV data into Silver Catalyst and export your project data in the CSV format. CSV stands for comma separated values and it is a format used by spreadsheet applications for import and export. Therefore, you can use this plugin when you want to import data from a spreadsheet to export data to a spreadsheet.

In order to import data from a spreadsheet, perform the following steps

1. Ensure the the spreadsheet has columns with the task description and optionally the priority, person assigned to, estimate remaining, status and notes.
2. Save the spreadsheet in CSV format. You can do this by going to File->Save As and selecting the Unicode Text format (for Microsoft Excel) or Text CSV format (for OpenOffice Calc). Other spreadsheet programs will have an equivalent format.
3. Go to Silver Catalyst and select the CSV Import/Export plugin. Select the exported CSV file to import it into Silver Catalyst.

Chapter 14
Further Resources

Extending the Tool

Silver Catalyst can be extended to do a lot of other things. For instance, did you know that you could change the look of the Silver Catalyst pages and put your team or company branding on the website?

For these and other extensions, check out the Extras section of the website at http://www.silverstripesoftware.com/extras/

Silver Stripe Blog

If you are interested in project management, agile software development or software delivery, check out the Silver Stripe Blog at http://www.silverstripesoftware.com/blog/

Community Forum

A Yahoo Group has been setup to enable you to discuss software delivery with fellow users. To join the group, go to http://tech.groups.yahoo.com/group/catalystpm and click the “Join This Group!” button on the top right corner. You need a Yahoo account to join the group.

Online Resources

There are a number of excellent discussion groups for discussing agile software development and software delivery. Here are links to some of them:

scrumdevelopment	http://groups.yahoo.com/group/scrumdevelopment/
extremeprogramming	http://groups.yahoo.com/group/extremeprogramming/
crystalclear	http://groups.yahoo.com/group/crystalclear/
agileprojectmanagement	http://groups.yahoo.com/group/agileprojectmanagement/
agilemanagement	http://tech.groups.yahoo.com/group/agilemanagement/
pragprog	http://groups.yahoo.com/group/pragprog/
agilemodeling	http://tech.groups.yahoo.com/group/agilemodeling/
industrialxp	http://groups.yahoo.com/group/industrialxp/
agile-testing	http://groups.yahoo.com/group/agile-testing/
agile-usability	http://groups.yahoo.com/group/agile-usability/

Getting in Touch

For help on any part of Silver Catalyst, feel free to send an email to support@silverstripesoftware.com